

# Forecast Your Way to Revenue Growth:

# A Blueprint for Sales and Revenue Leaders

Great sales forecasting isn't just about accuracy. It's about growth. (You want both.)



**SCENARIOS** 

- Revenue falls as predicted. Revenue grows – not as predicted.
- Revenue grows as predicted!



### AI uses CRM data to make

**BEGINNER** 

**ADVANCED** 

forecasts more accurate. CRM makes recommendations

based on data that lead to smarter action.

ready for the next stage."

Sales reps calculate

Example: "This customer is

forecasts in spreadsheets and email the numbers to their managers. Managers send more emails

back with actions, but the actions are based on stale numbers and insights.

## leaving the CRM. Here's how it works.

Growth forecasting: How it works in Salesforce

Dream of big numbers and hit them - without ever

Structure Roll up your Get pointed pipeline to to the best your

Bring in your

data

pipeline

your forecast

next step

and grow

Predict,

plan,



### Bring all your data in one place, and never lose track of customers as they make the journey downstream. Salesforce translates

sales and revenue data into apples and

Bring customer data into

Salesforce for total visibility

oranges apples that you can see as they flow down your pipeline – as leads turn into deals and deals turn into revenue.

### common sales process, too. Define the stages of your pipeline in Salesforce so all your reps know what's required to move

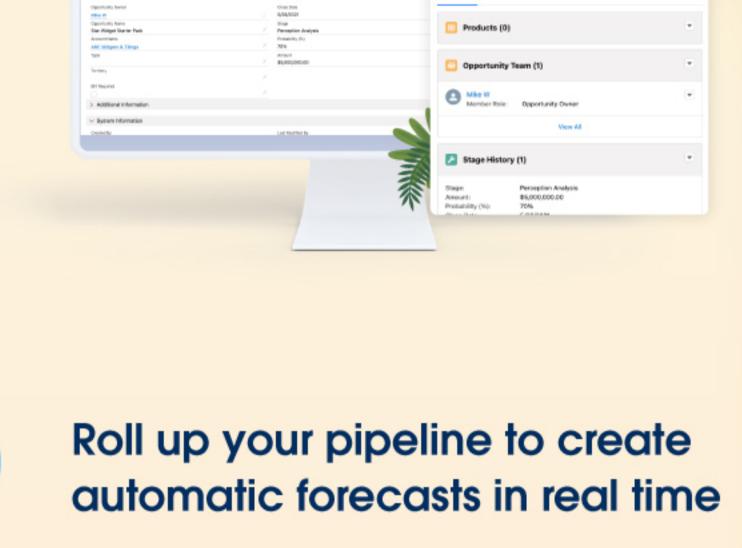
customers to the next stage. Leaders can

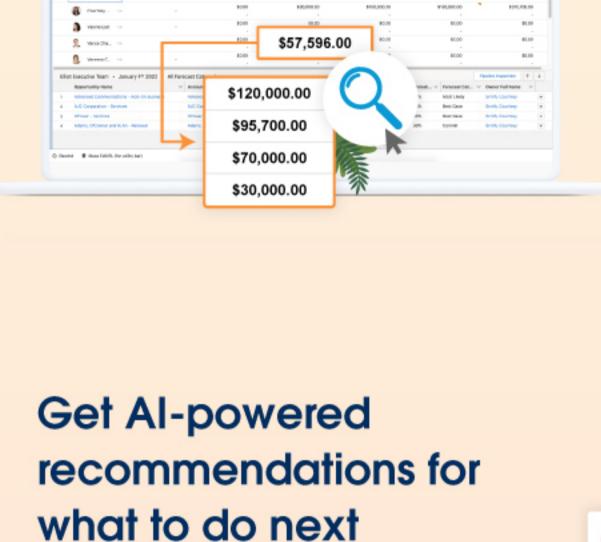
Beyond common data, your teams need a

see the status of every deal

Structure your pipeline to

view snapshots of opportunities to intervene when forecasts are at risk, and work with sales reps to advance deals together as a pack - no more lone wolves.





#### Salesforce. View forecasts for any category ("Best Case Forecast" for example), and get the flexibility to build custom categories

by updating fields or moving them to different

As you make changes to opportunities -

stages - forecasts update automatically in

(like "Annual Contract Value") that match

how you manage your unique business.

Close Date pulled in by 16 days Send quote to customer Changed by Courtney Smith, on November 18, 2021

### your forecast on the same platform where you get insights by making pipeline adjustments on the fly.

Salesforce does math behind the

recommendations for the best actions

to take on your deals. Take action to hit

scenes of every deal, serving up

Predict: Spot and act on early warnings of risk.

Dig into pipeline

dashboards for under-

performing forecasts to

catch problems before

it's too late.

Case Study: Vicinity Centres saves 1,000 hours annually with automated reporting on weekly tenant changes As the General Manager of Enterprise Technology, Ian Padgham

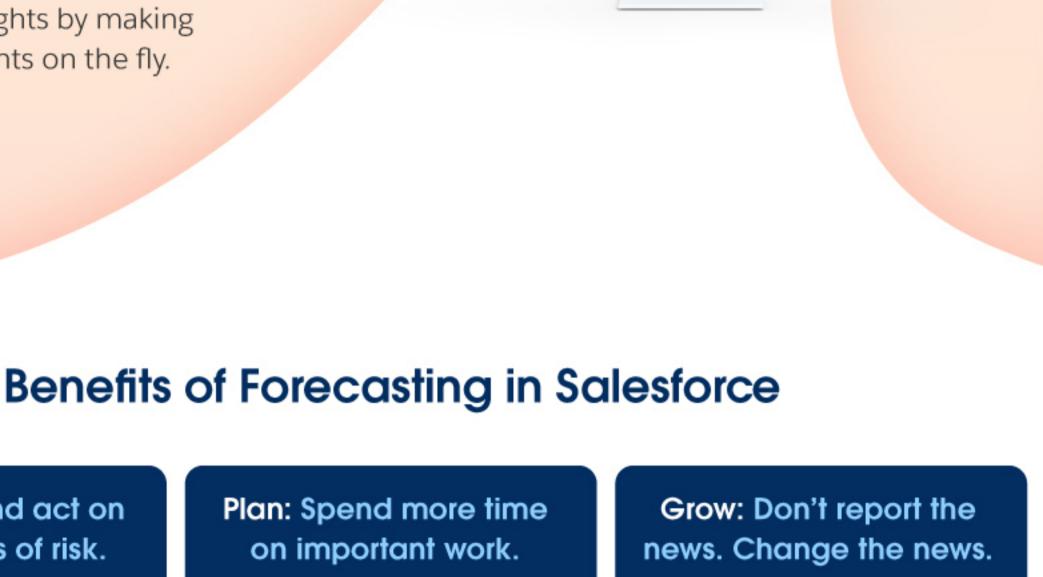
Automatic rollups save

hours of time a week.

Focus instead on strategy

and motions, like

campaigns and plays.



See further into the

future and use accurate

predictions to make

strategic decisions,

earlier.

#### **Solutions** Challenges **Burning platform** Salesforce CPQ supports for change. more complex quoting

needed to best support its retailers as the retail industry evolves.

Vicinity turned to Salesforce to streamline the sales and booking

of pop-up spaces. It was time to level up, and Salesforce helped.

and media sales within its the right rate according to retail centres. business rules. Find a permanent solution Salesforce Platform for casual leasing. provides low code tools to help Vicinity digitise

> This helped Vicinity streamline its pop up leasing, media sales and integration between Salesforce and its ERP.

processes.

for the media sales team.

This ensures pricing and

discounts are applied at

Sales Cloud helps sales reps capture all of the details required to complete bookings.

Allowing teams to do everything inside one system quoting, booking, and invoicing.

## the media sales team as a result of back-office automation.

**Results** 

increase in efficiency for

annually.

reporting on tenant changes.

### The business wanted a solution that could manage

Vicinity needed to replace

an end of life system used

to manage pop up leasing

the entire pop up leasing process in one system, including tasks like invoicing and billing.

### Transform and consolidate manual processes. In moving to a new

solution, the business wanted to streamline and digitise processes, while reducing manual effort.

#### automated payment matching, including over 500 hours saved

reconciliation on

1,000 hours to be saved annually as a result of automated

Learn to love your sales forecasting



salesforce

Watch the demo or hit us up.

We're here to help you every step of the way.